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Appendix 1: Economic and sector reporting

Culture, Heritage, And Sport Committee

November 2024





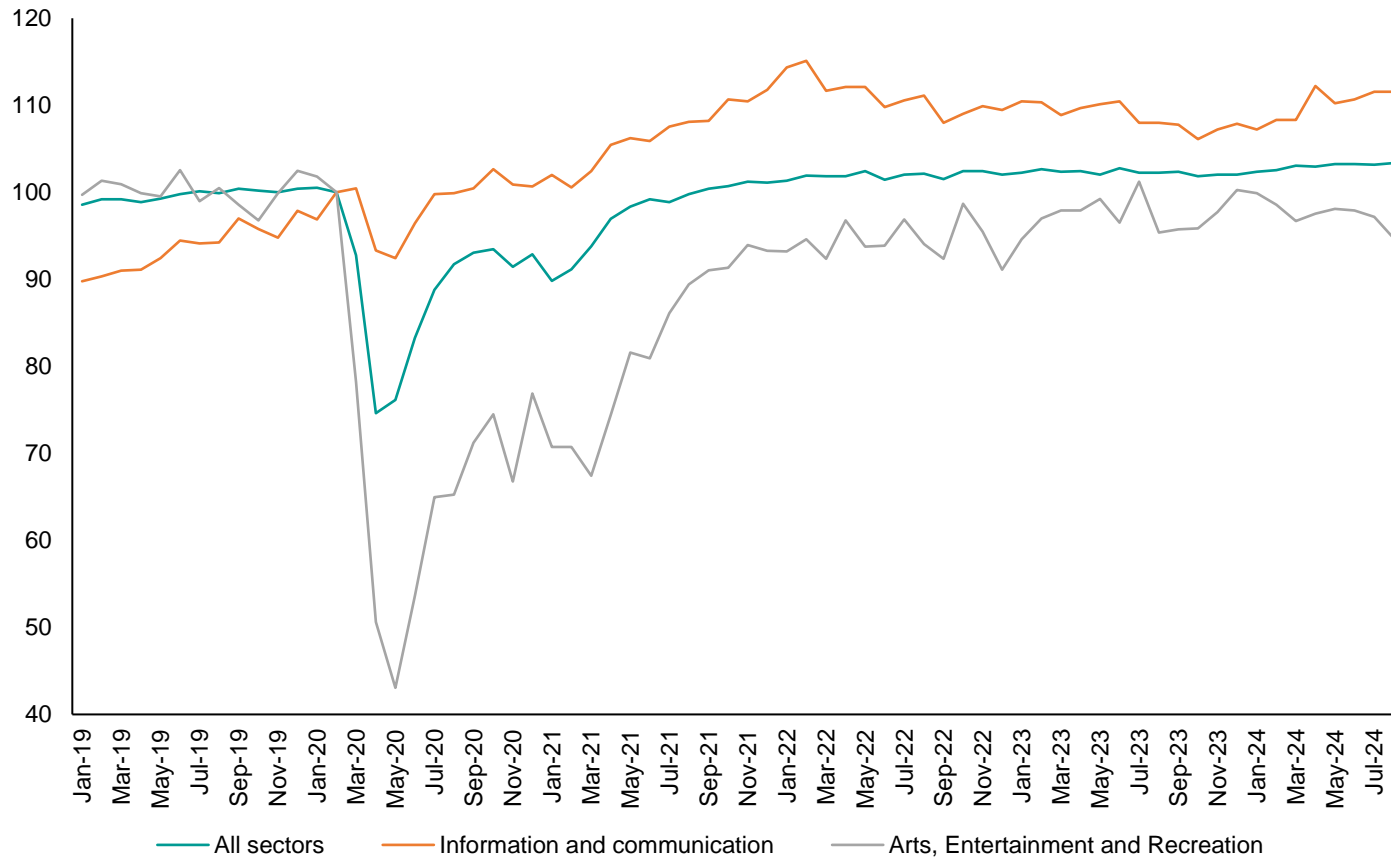
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National economic context

After a strong recovery, arts and entertainment moved to negative territory

Figure 1: Trend in seasonally-adjusted output (gross value added) by broad sector, UK (index, 2019=100)



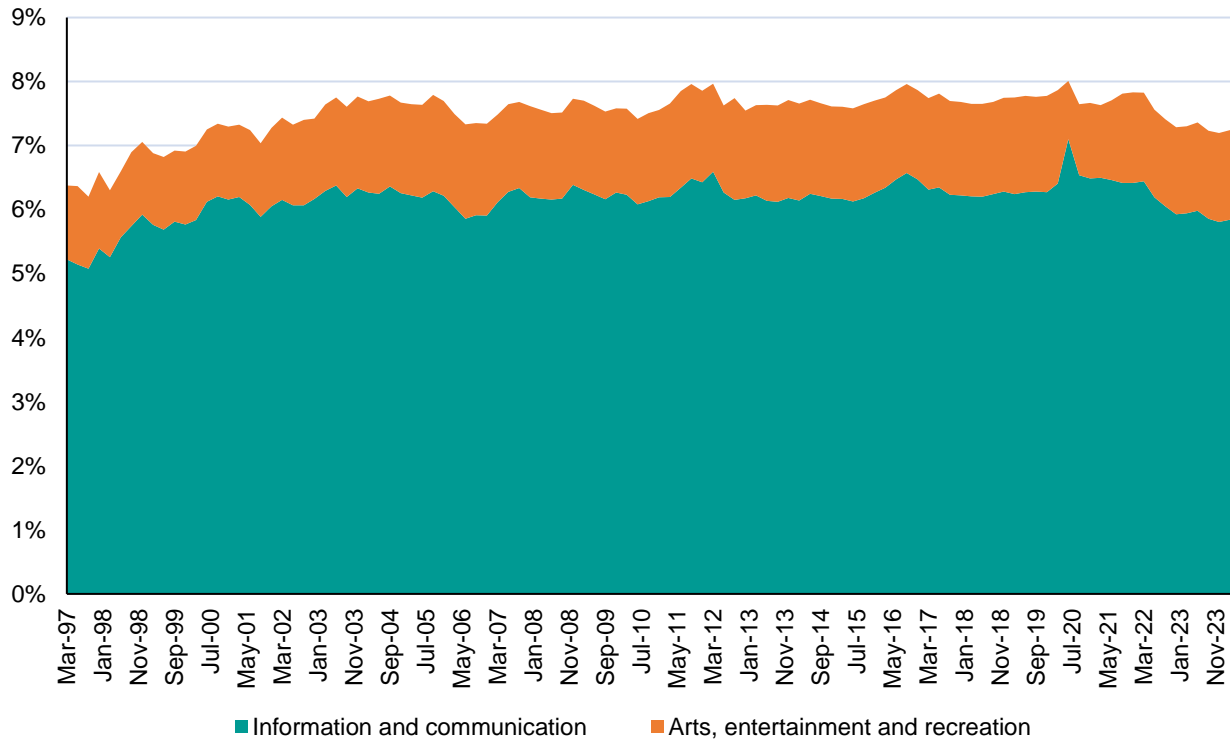
Variation	All sectors	Information and communication	Arts, Entertainment and Recreation
Last 6 months	0.8%	3.0%	-3.9%
Same month 2023	1.1%	3.3%	-0.7%
Same month 2019	3.5%	18.4%	-5.7%

Source: Monthly GDP Table, ONS

Arts and entertainment includes: Creative, arts and entertainment; Libraries, archives, museums; Gambling and betting activities; and Sports, amusement, recreation
Information and communication includes: Publishing activities; Motion picture, video and TV programme production, sound recording and music publishing activities; Programming and broadcasting activities; Telecommunications; Computer programming, consultancy; Information service activities.

Creative industries at national level mostly stable at around 7% of the total economy

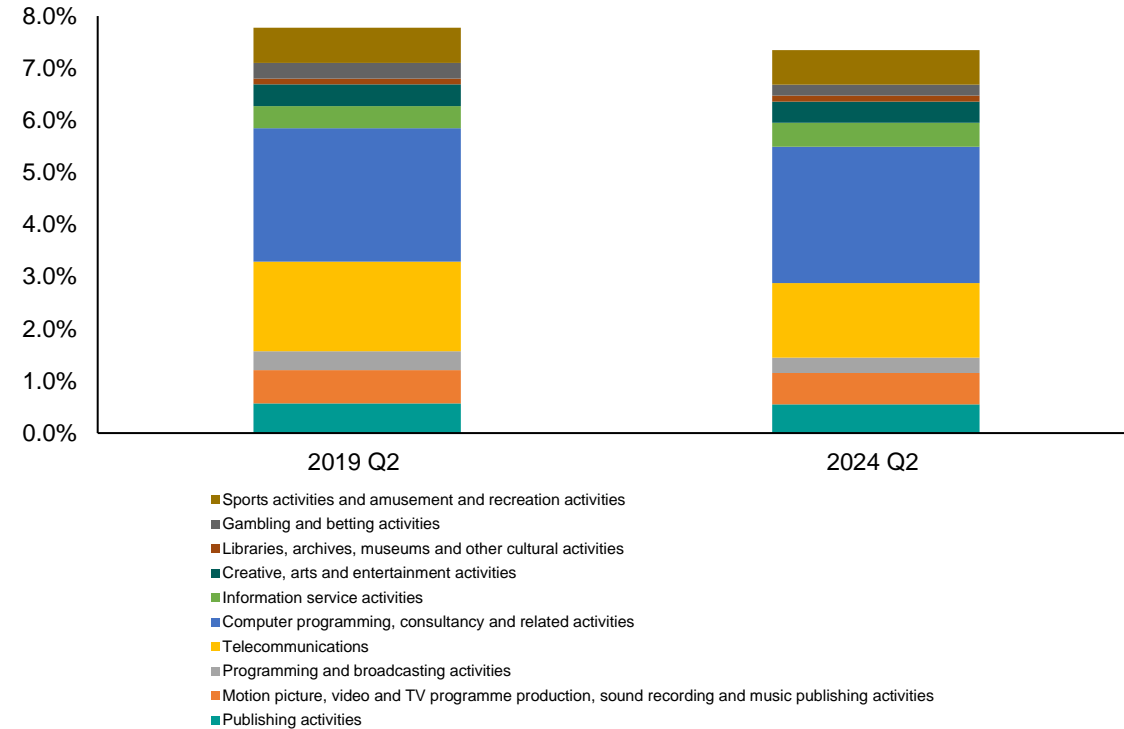
Figure 2: Creative industries as a share of gross value added (GVA) in current prices, UK, seasonally adjusted (1Q1997-2Q2024)



Source: Monthly GDP Table, ONS

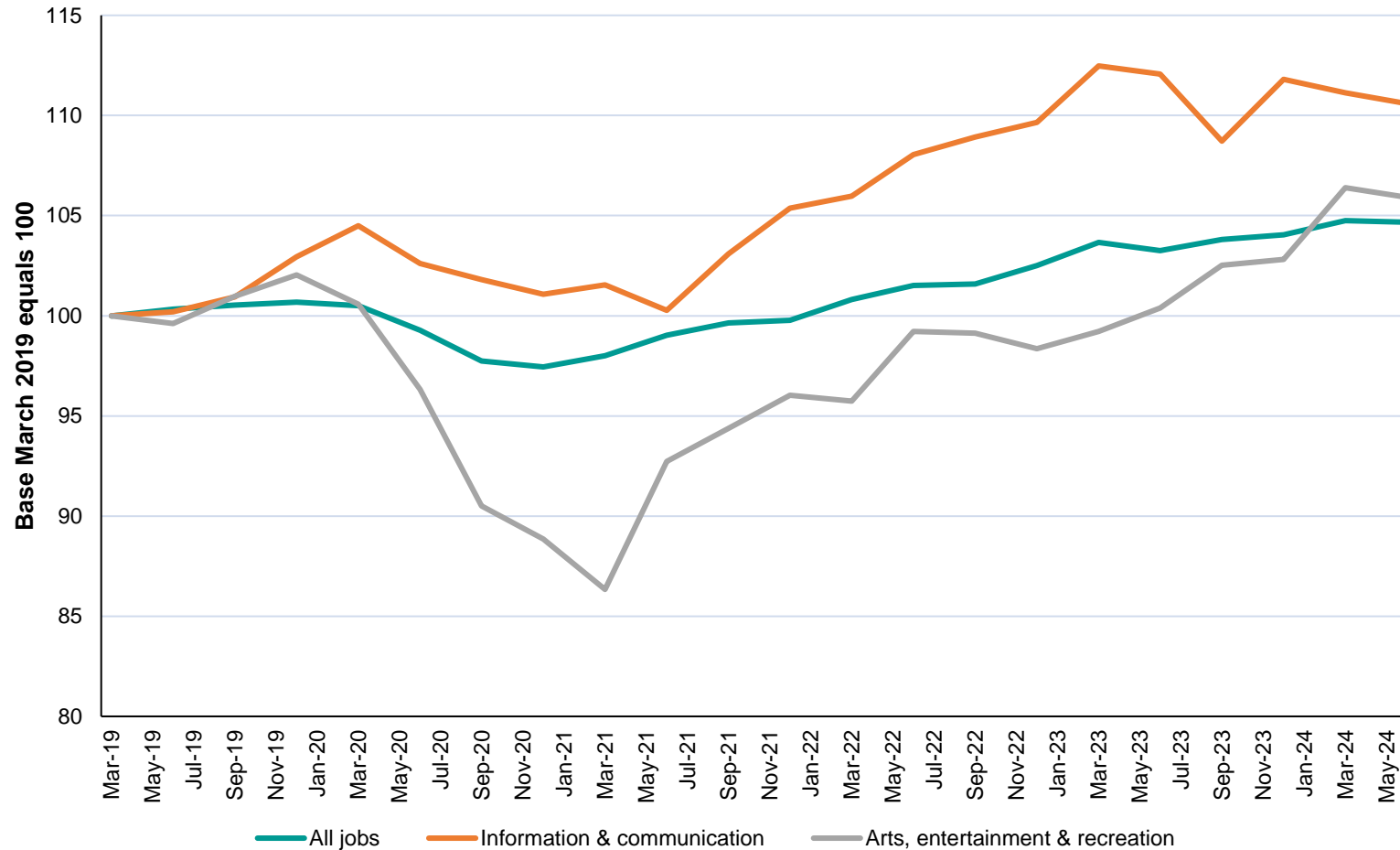
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Figure 3: Detailed creative industries as a share of gross value added (GVA) in current prices, UK, seasonally adjusted in 1Q2024



Employment declines in *Information and communication and Arts, entertainment and recreation*

Figure 6: Trend in employment by Information & Communication and Arts, entertainment & recreation, United Kingdom



Variation	All sectors	Information and communication	Arts, Entertainment and Recreation
Last 6 months	2.1%	0.9%	7.7%
Same month 2023	1.4%	-1.3%	5.5%
Same month 2019	4.7%	10.6%	5.9%

Source: Workforce Jobs, ONS



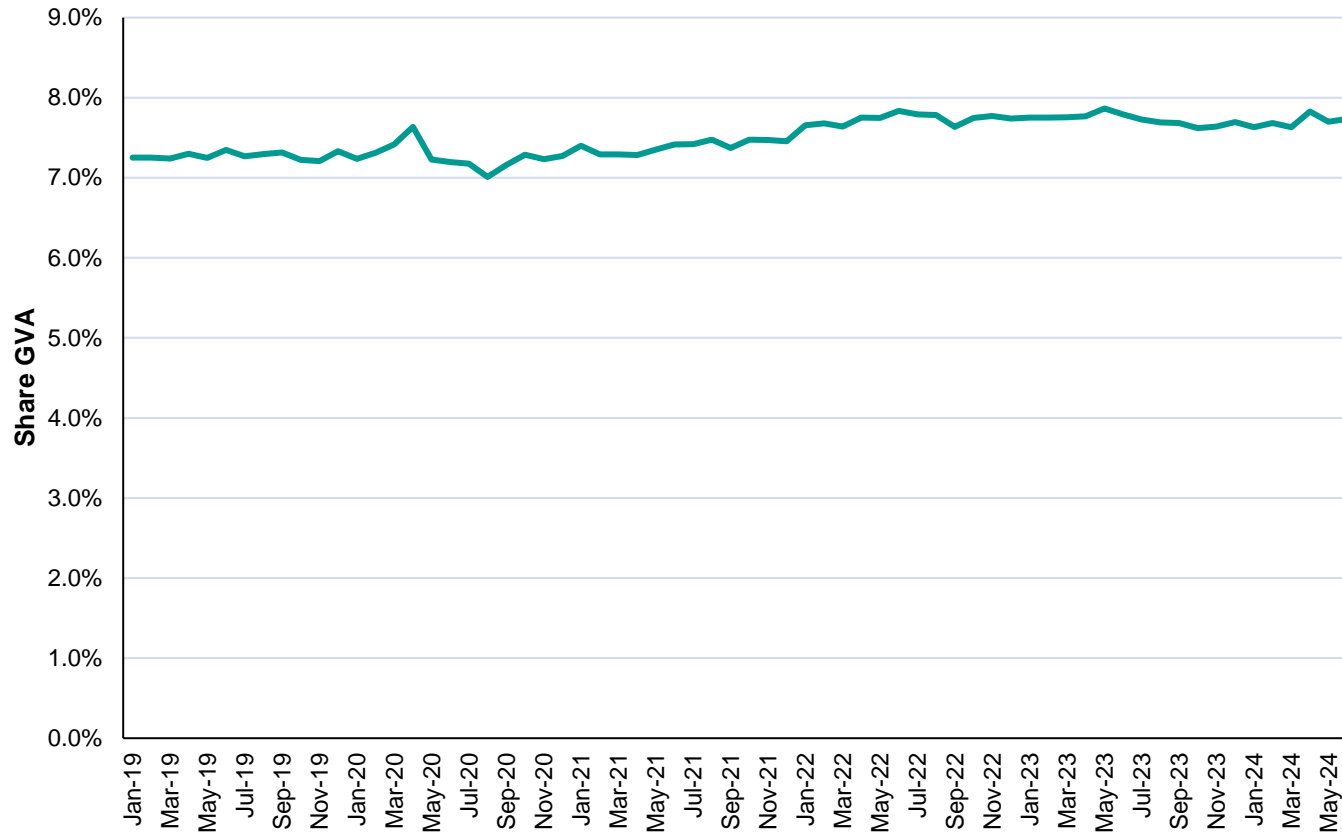
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DCMS Economic performance

Sectors classified as DCMS account for 7% of the economy nationally

Figure: Estimated monthly Gross Value Added DCMS as a share of UK economy, All DCMS (excl Tourism)



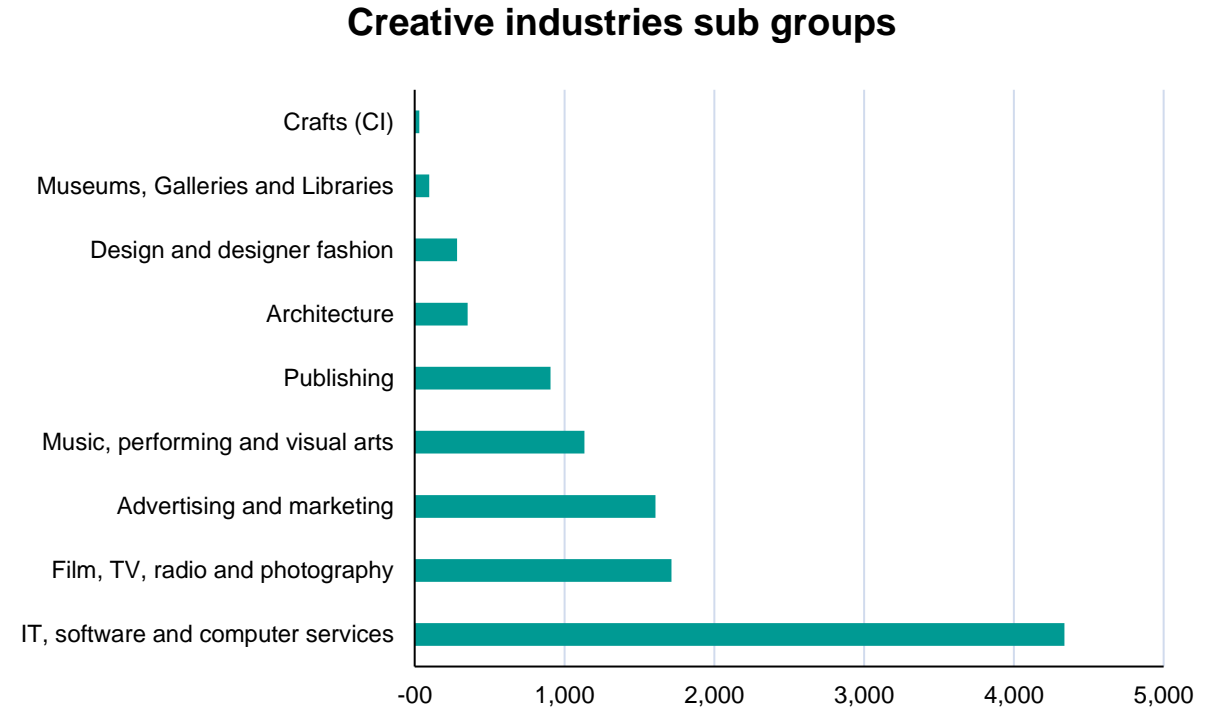
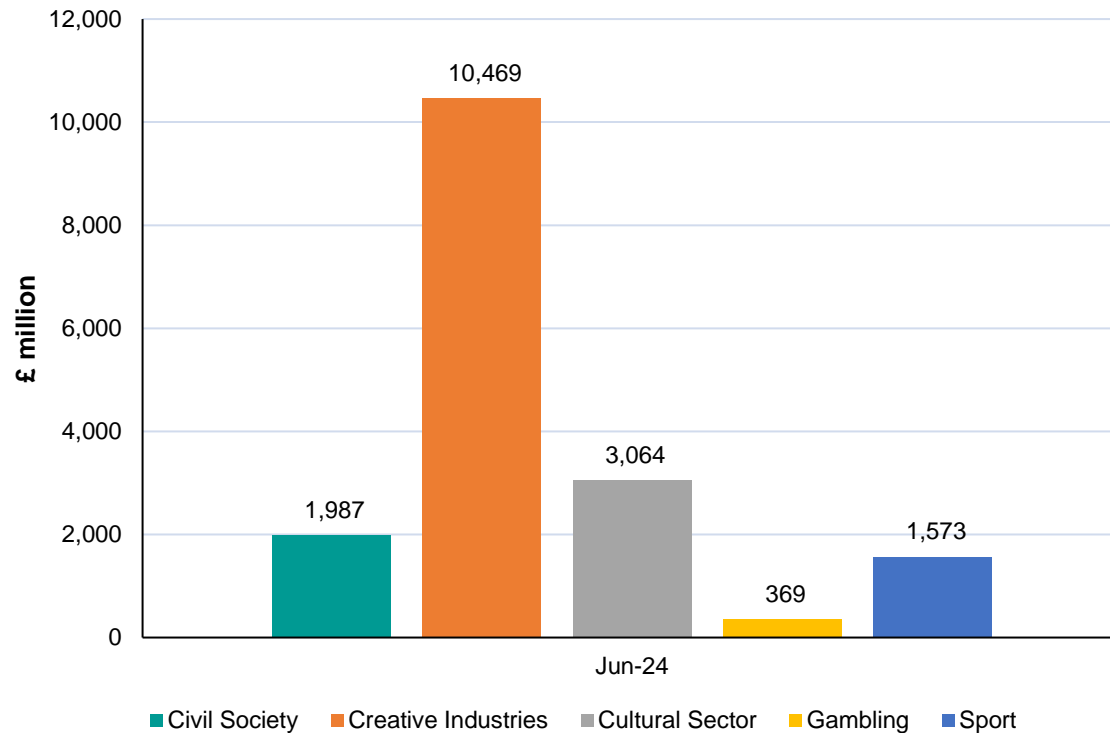
GVA generated by those sectors (excluding travel) was £14.3bn

Source: Department for Culture, Media and Sport, DCMS Economic Estimates: Monthly GVA (to June 2024).

Note: The DCMS includes Creative Industries, Cultural Sector, Digital Sector, Gambling, Sport, Telecoms and Tourism. This data excludes tourism. There is an overlap between DCMS sector definitions, which means we cannot simply add the different sectors together to form a DCMS total figure

Creative industries is the largest group, followed by the culture sector

Figure: Estimated monthly Gross Value Added DCSM as a share of UK economy, All DCMSI (excl Tourism) in June 2024

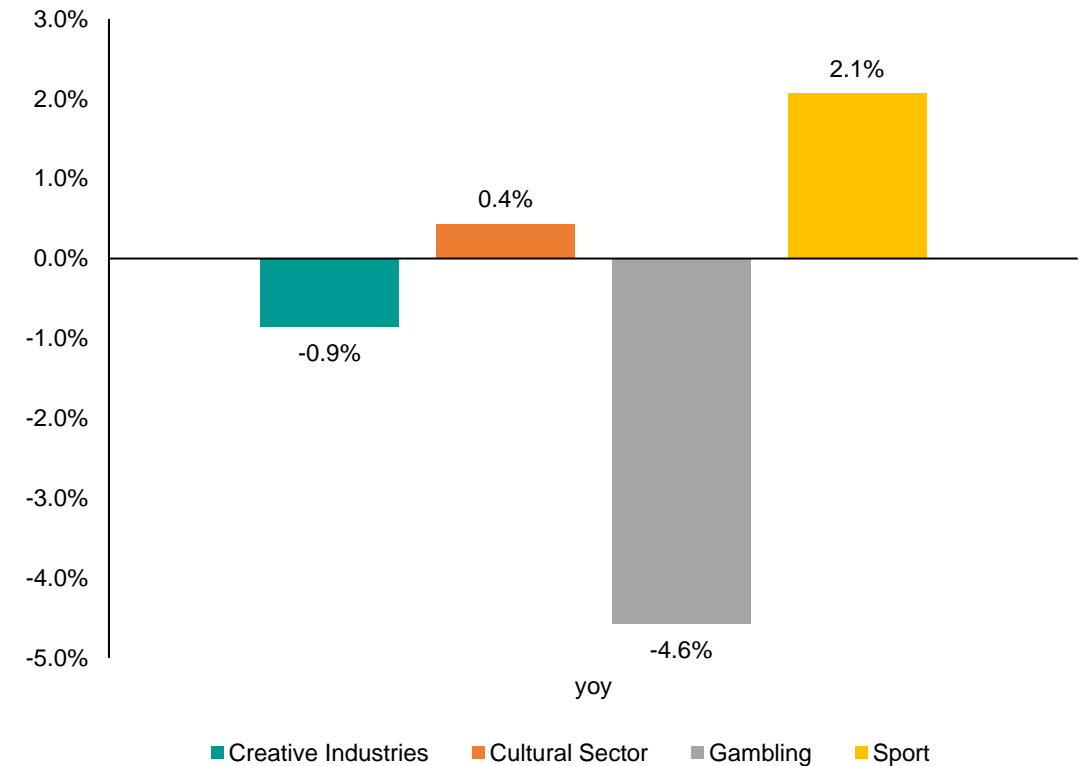
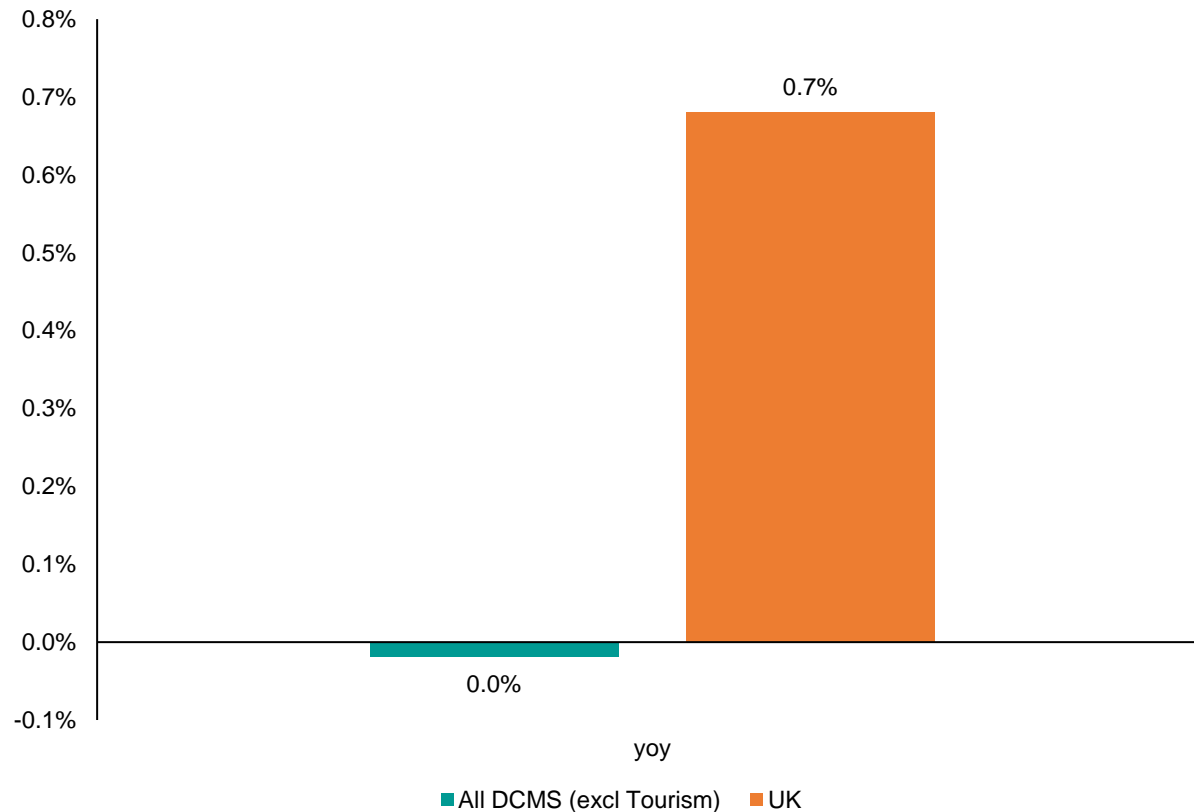


Source: Department for Culture, Media and Sport, DCMS Economic Estimates: Monthly GVA (to June 2024).

Note: The DCMS includes Creative Industries, Cultural Sector, Digital Sector, Gambling, Sport, Telecoms and Tourism. This data excludes tourism. There is an overlap between DCMS sector definitions, which means we cannot simply add the different sectors together to form a DCMS total figure

DCMS sectors growing slower than national average as a result of weaker performance of creative industries and gambling

Figure: Real GVA growth (yoy), All DCMS (excl Tourism) in June 2024



Source: Department for Culture, Media and Sport, DCMS Economic Estimates: Monthly GVA (to June 2024).
Note: The DCMS includes Creative Industries, Cultural Sector, Digital Sector, Gambling, Sport, Telecoms and Tourism. This data excludes tourism. There is an overlap between DCMS sector definitions, which means we cannot simply add the different sectors together to form a DCMS total figure



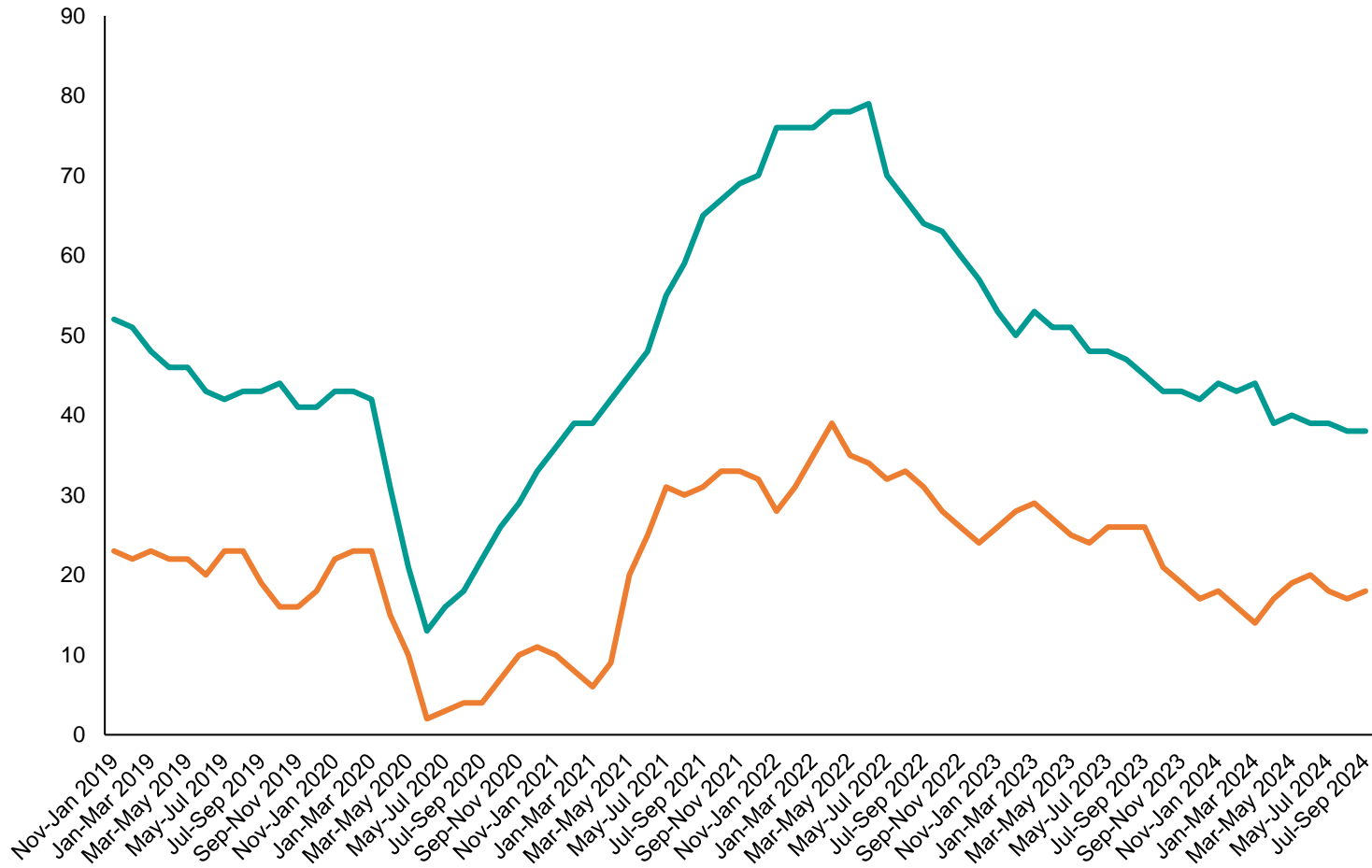
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National labour market performance

Job vacancies continue falling as the sector activity weakens

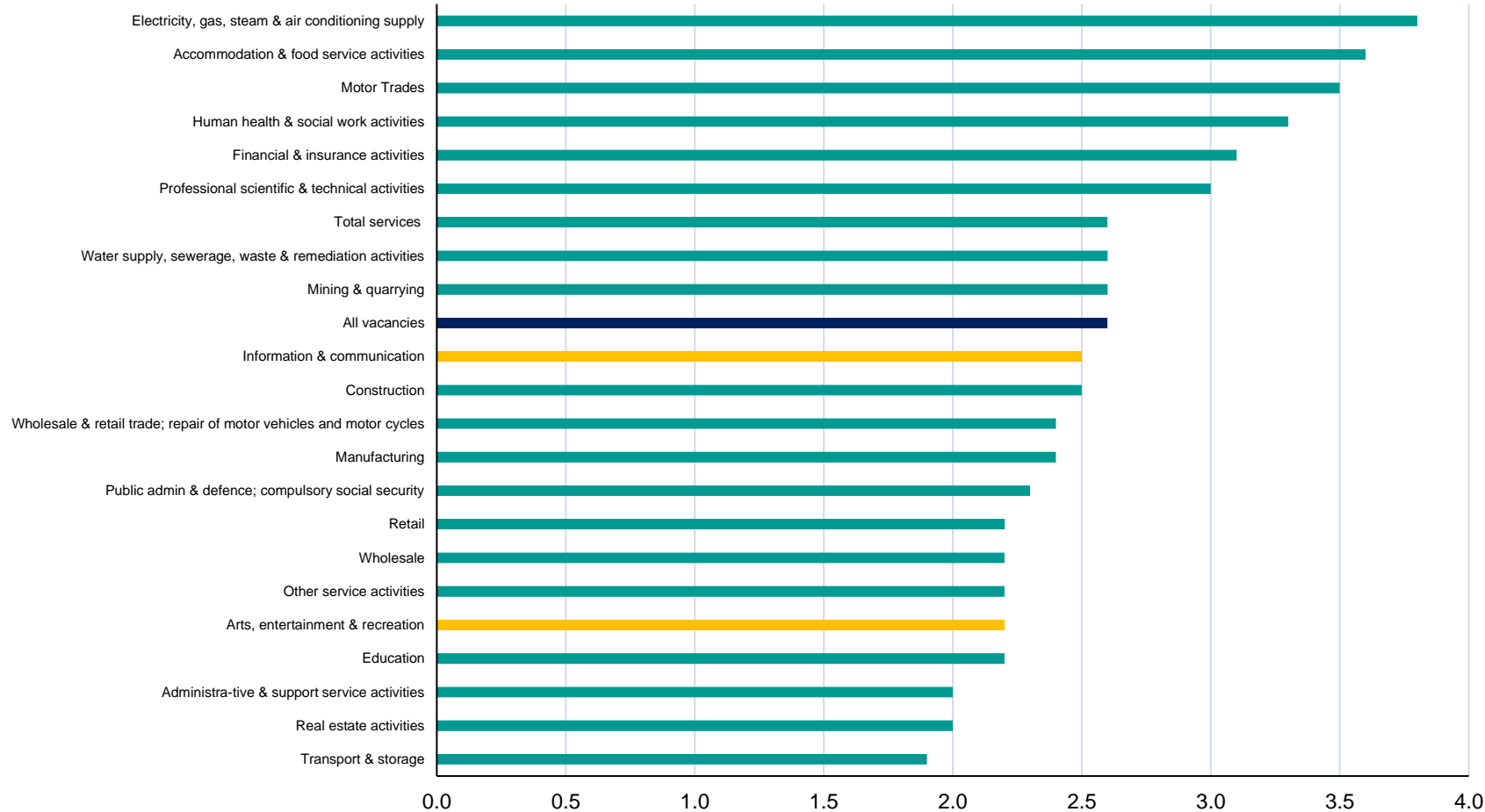
Figure 6: Vacancies by industry (000s), seasonally adjusted, UK



Source: Vacancies by industry, ONS

Arts & entertainment below average in terms of ratio of vacancies to employment and both lower than a year ago

Figure 7: Vacancies per 100 employee jobs by industry, seasonally adjusted, UK (Mar-May 2024)

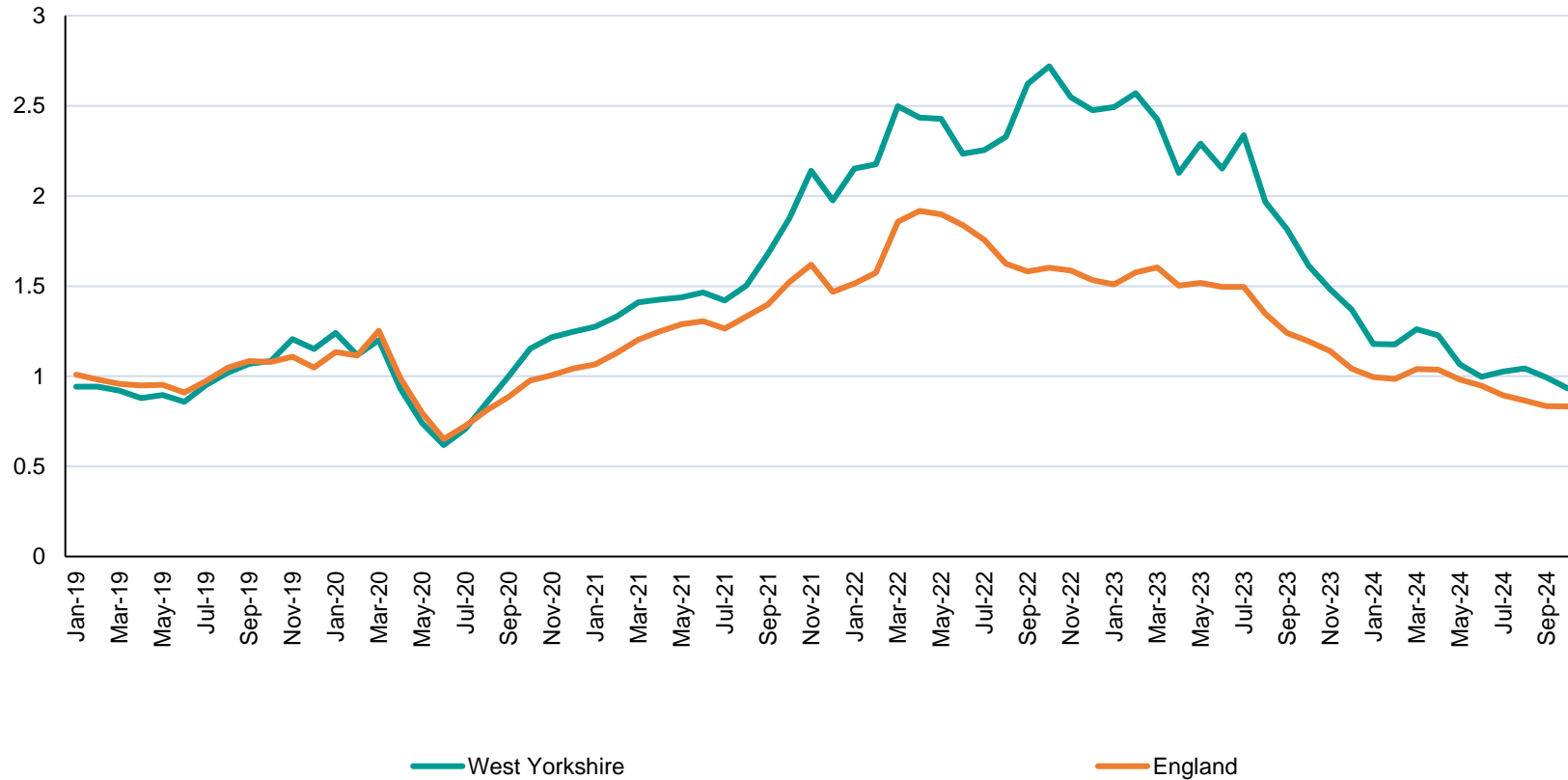


Information and Communication in line with the average

Source: Vacancies by industry, ONS

Recruitment activity has fallen back to its pre-pandemic level but continues to perform slightly better than England

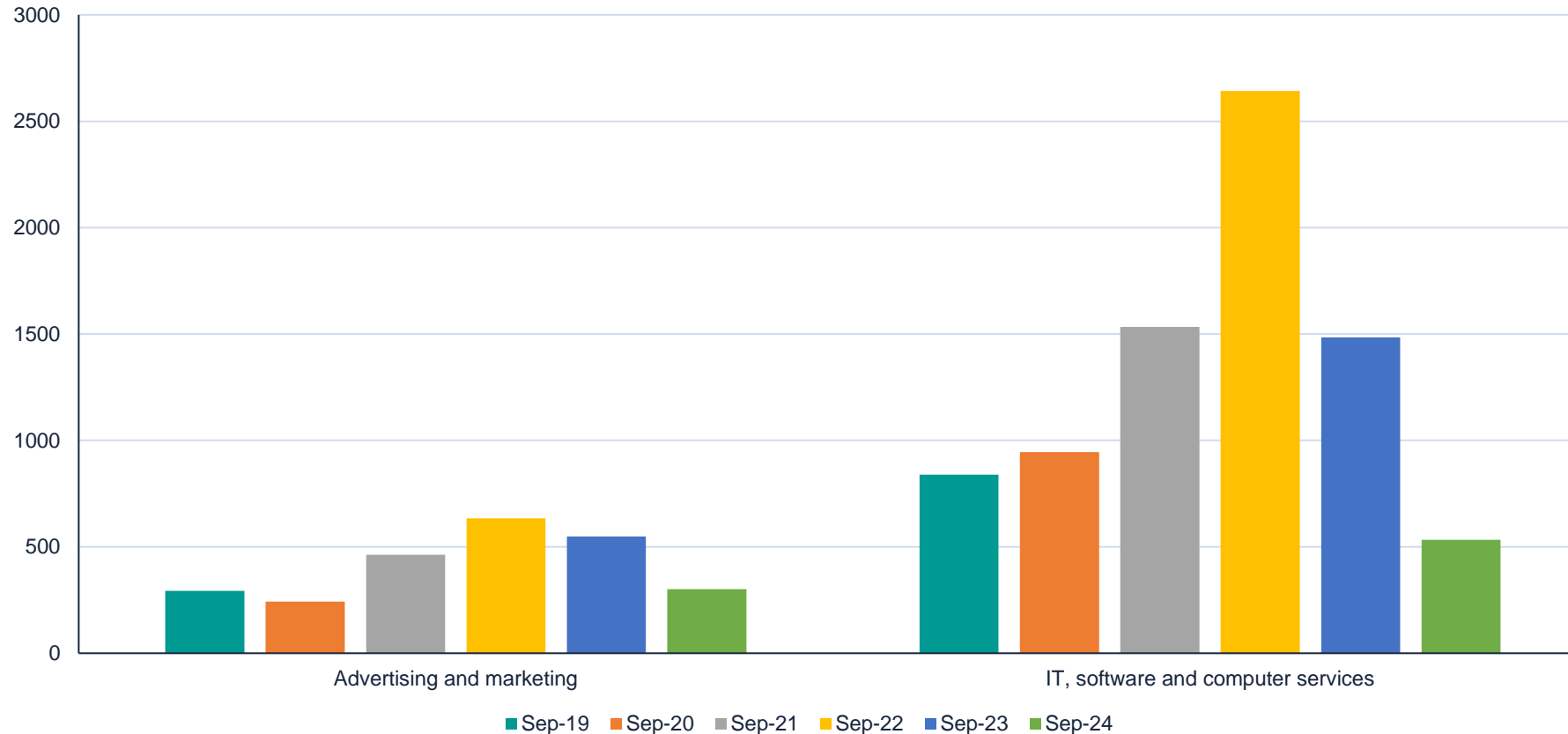
Figure 6: Index of monthly count of job postings in culture, heritage and sport occupations, 3 month moving average, 2019=100



Source: Lightcast

IT job postings below 2019 levels, while advertising in line with those levels

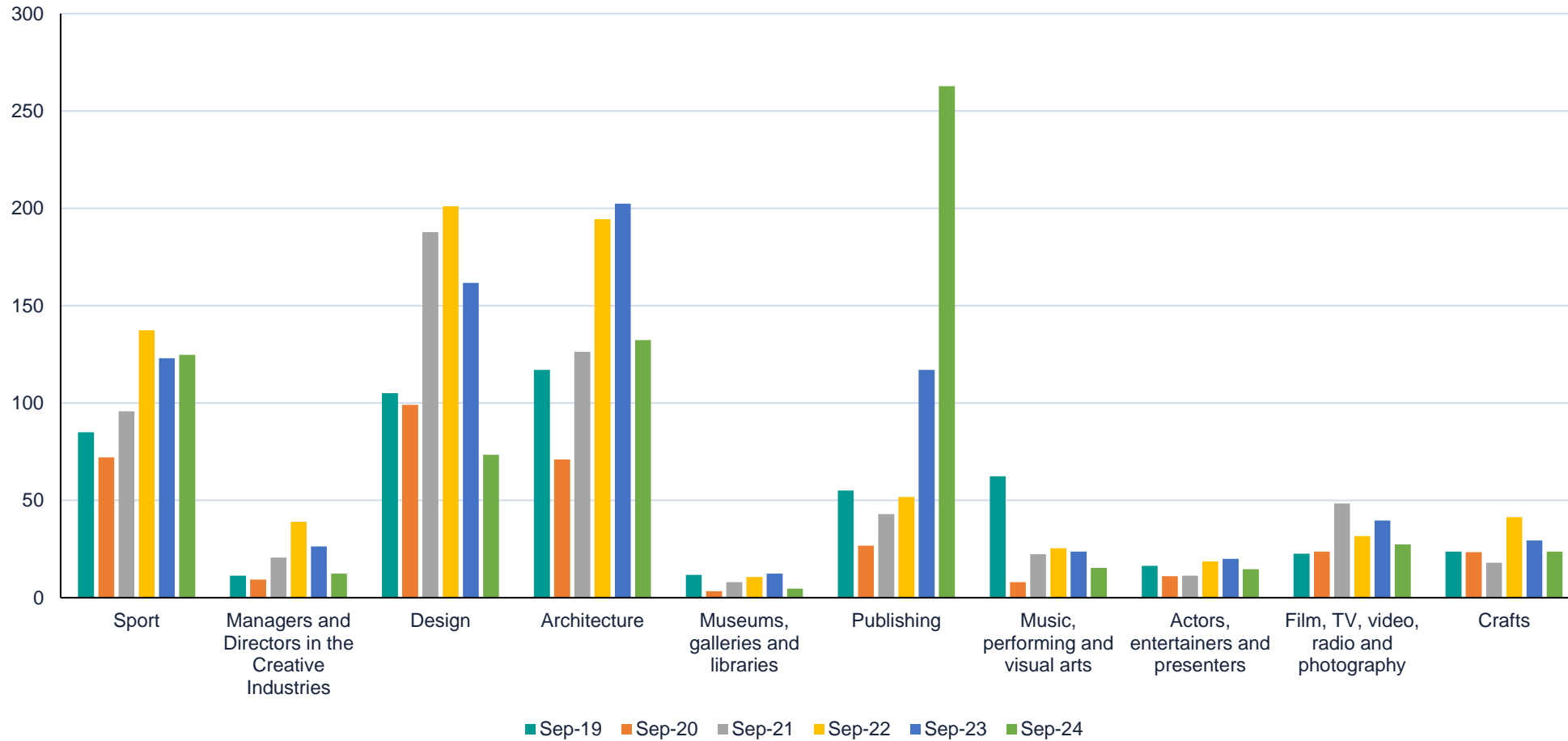
Figure: monthly count of job postings in culture, heritage and sport occupations, 3 month moving average ending in September, West Yorkshire



Source: Lightcast

There have been a recent sharp increase in publishing, stability in sport and a broad decline of other subgroups

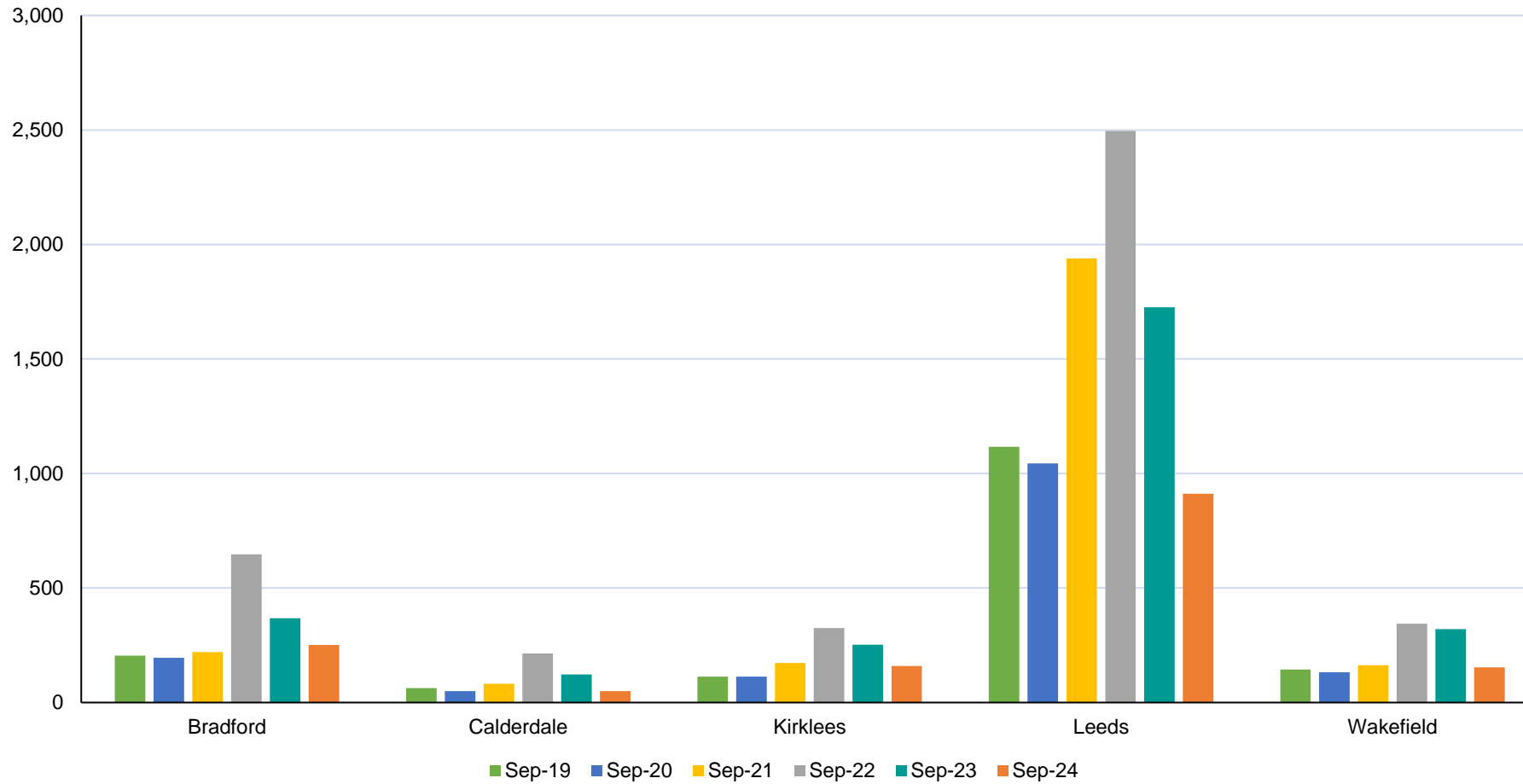
Figure: Unique count of job postings in culture, heritage and sport occupations, 3 month moving average, West Yorkshire



Source: Lightcast

Postings have fallen at strongly in the five local authorities between 2023 and 2024

Figure: monthly count of job postings in culture, heritage and sport occupations by local authority, 3 month moving average



Source: Lightcast



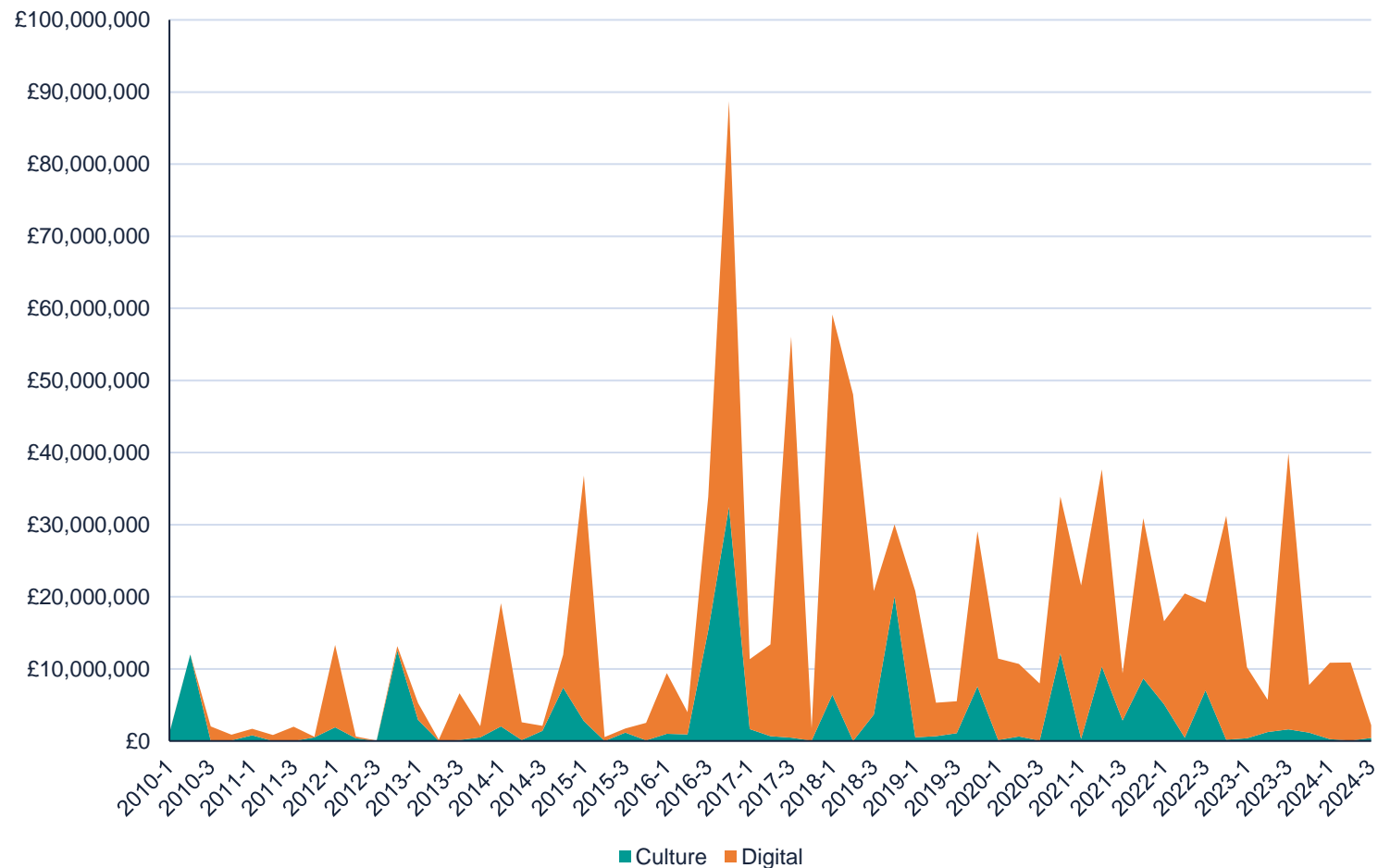
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Equity raised in the sectors

Since 2023, the sectors has raised almost no equity

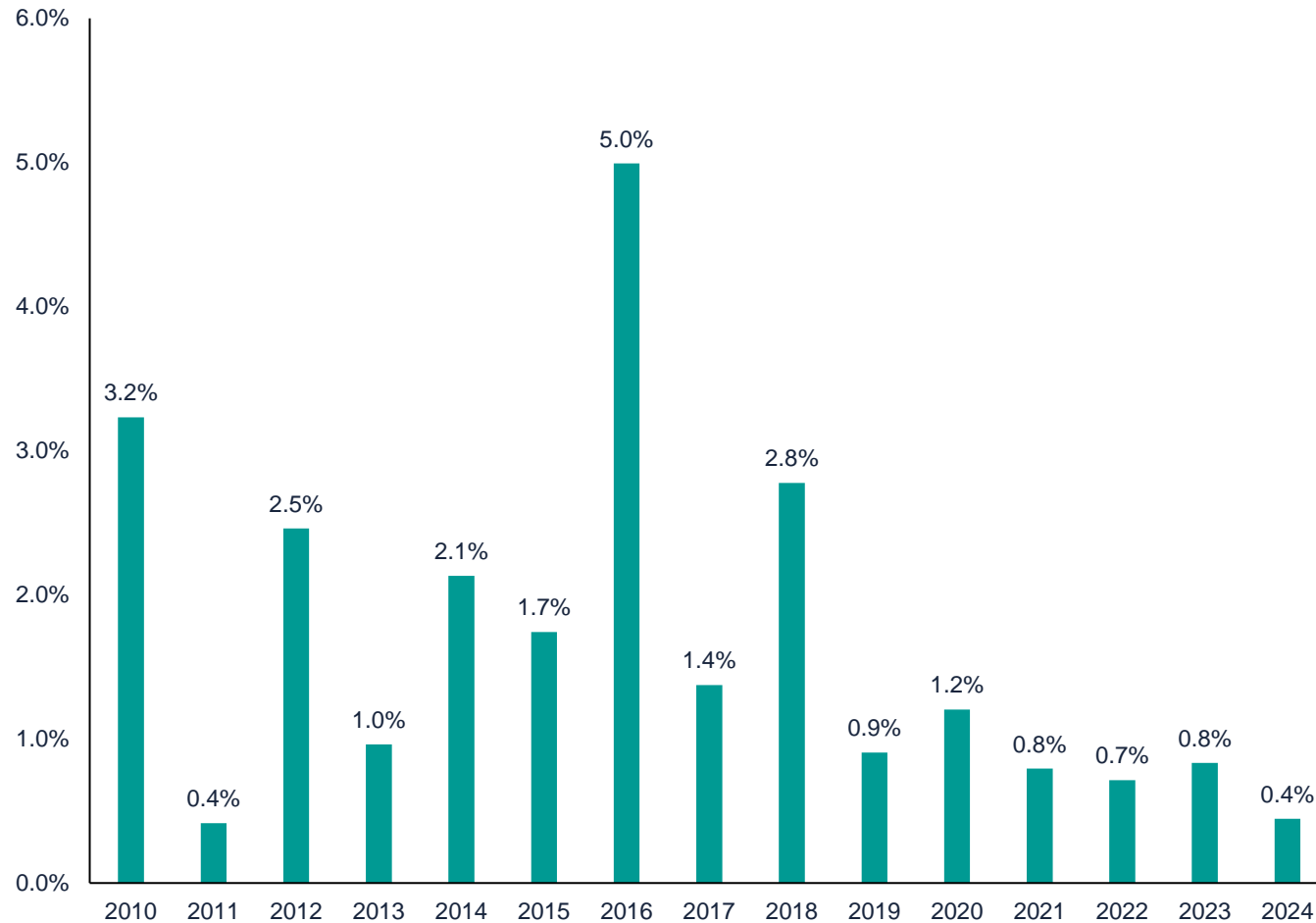
Figure: Equity raised in digital plus creative media and publishing sectors per quarter



Source: Beauhurst

Since 2021, fundraising as a share of the UK has been quite low

Figure: Equity raised in digital plus creative media and publishing sectors per year as a share of the UK



Source: *Beauhurst*



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Participation in culture, heritage and sport activities



Cultural participation mostly in line with England – increased in live sports and visiting museums and galleries

Figure: Proportion of adults aged 16 and over who engaged with culture, heritage and sport activities, 2023/24 West Yorkshire and England

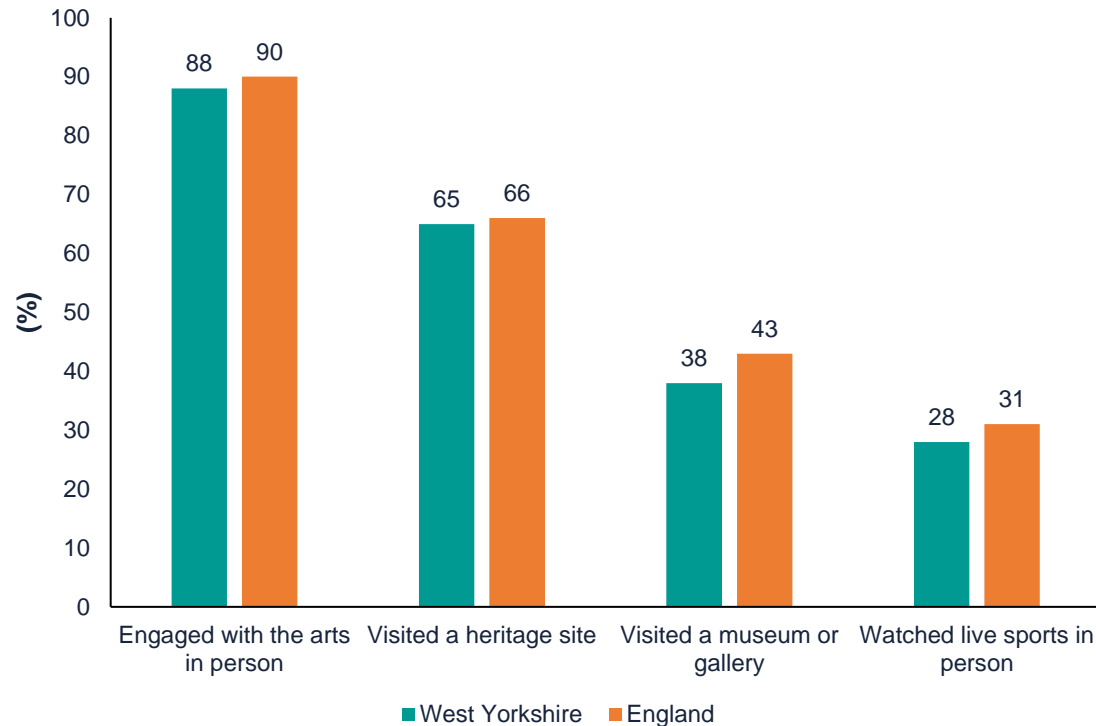
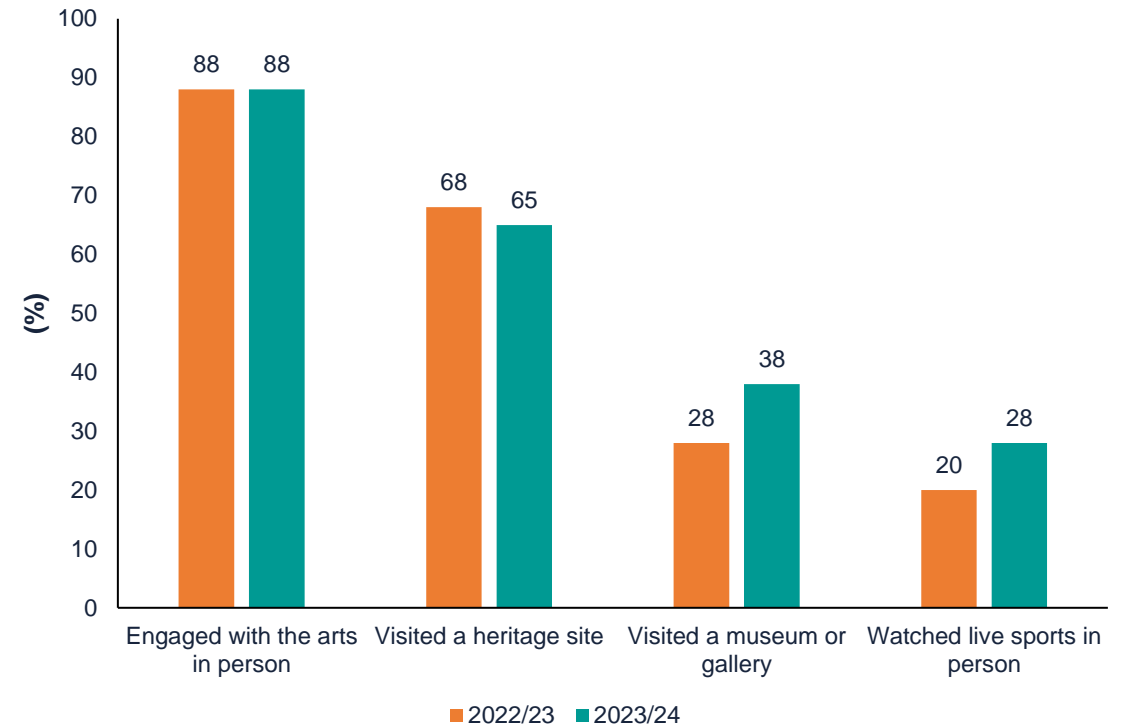


Figure: Proportion of adults aged 16 and over who engaged with culture, heritage and sport activities, West Yorkshire – 2022/23 and 2023/24



Source: DCMS Participation Survey 2023/24, Department for Digital, Culture, Media and Sport



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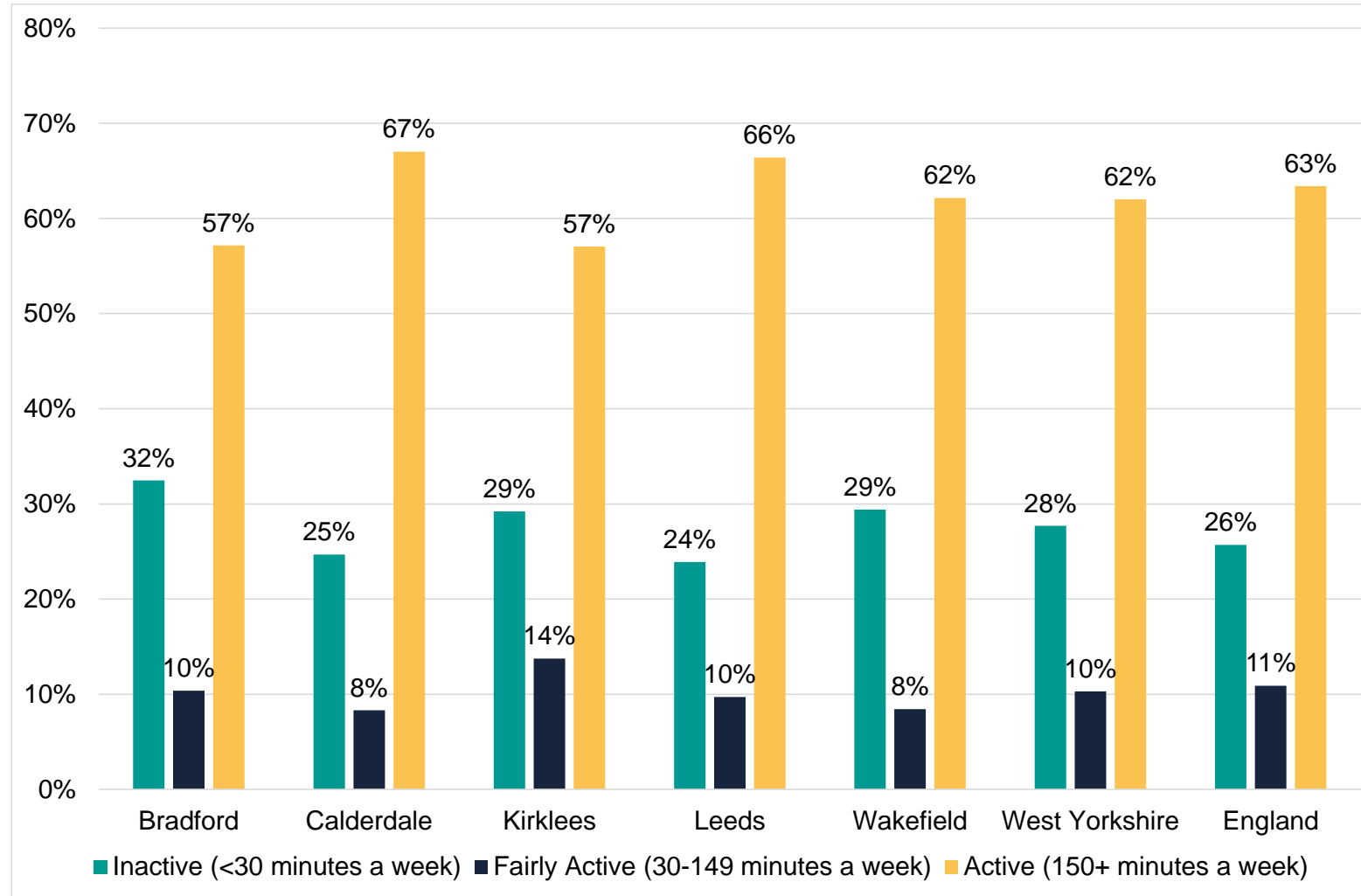
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Participation in culture, heritage and sport activities



Just under two-thirds of adults in West Yorkshire are physically active, similar to the national average

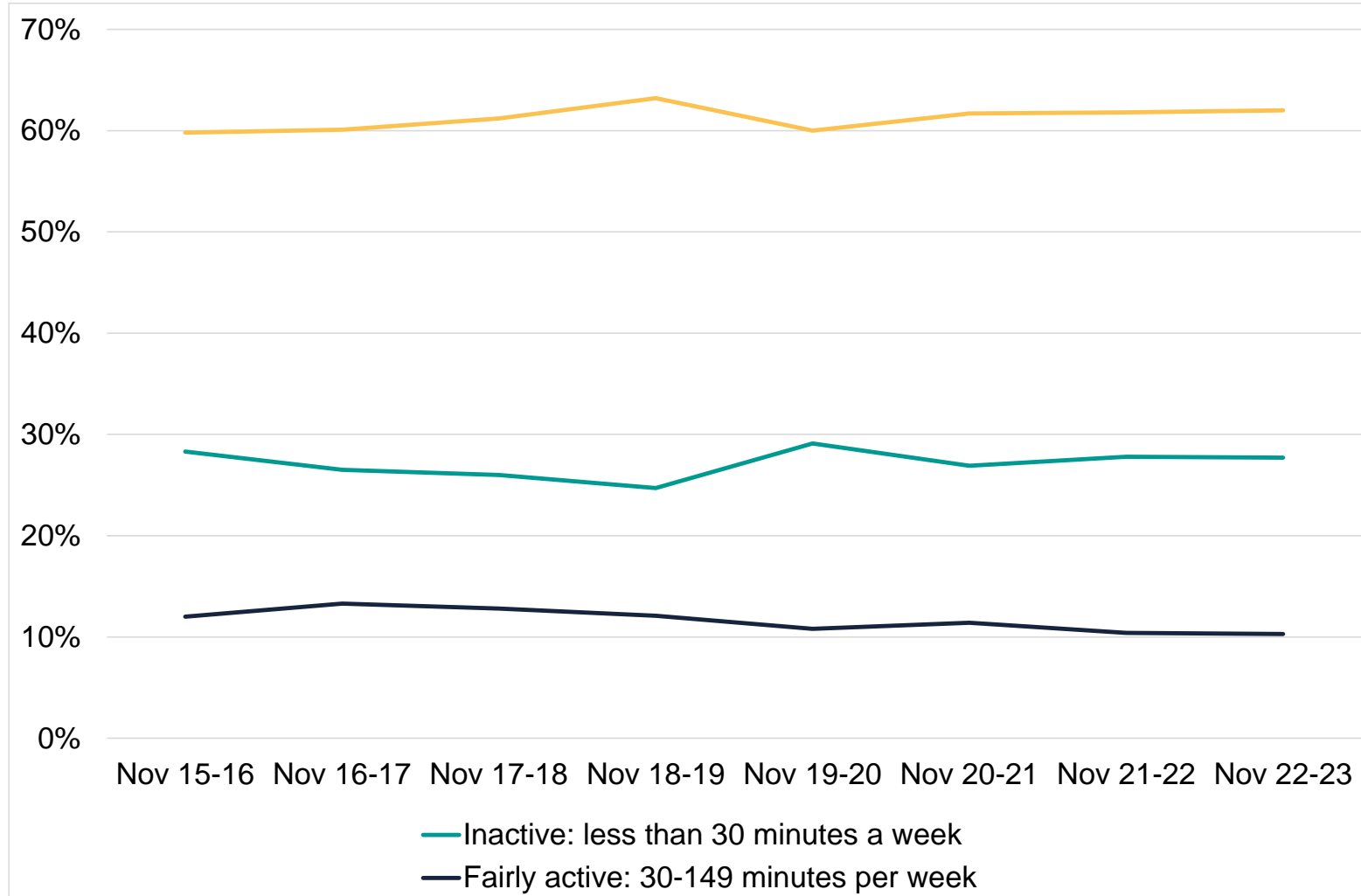
Figure: Sport and physical activity levels (% Adults aged 16+), 2022-23



Source: Sport England Active Lives Adult Survey

There has been little change in profile of physical activity since baseline was set in 2015/16

Figure: Trend in Sport and physical activity levels (Adults aged 16+), West Yorkshire Active Partnership



Source: Sport England Active Lives Adult Survey